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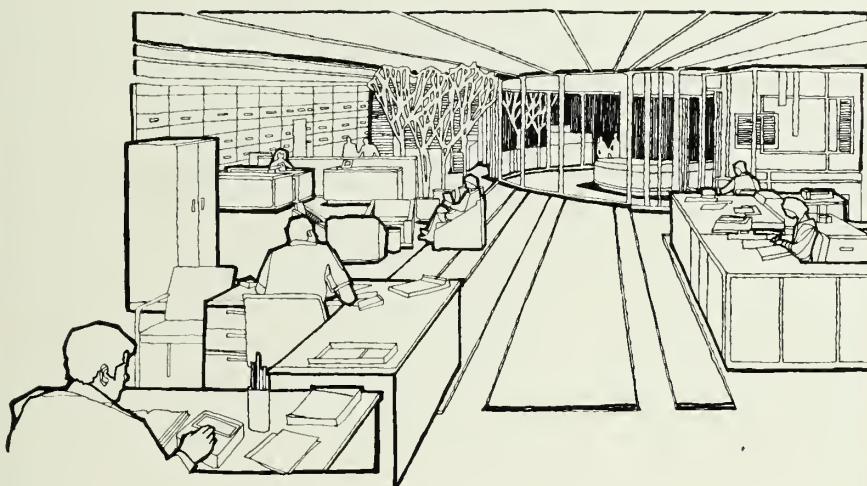
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BUSINESS EDUCATION CURRICULUM GUIDE

OFFICE PROCEDURES 20-30



Curriculum

Alberta
EDUCATION

OFFICE PROCEDURES 20-30

CURRICULUM GUIDE

1985

NOTICE TO TEACHERS

This Curriculum Guide is subject to review and revision, in keeping with any revision to the Business Education curricula which may occur as a result of the Secondary Education Policy Statement, June 12, 1985.





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NOTE: This publication is a service document. The advice and direction offered is not prescriptive except where it duplicates or paraphrases the content of the Program of Studies. In these instances, the content is in the same distinctive manner as is this notice so that the reader may readily identify all prescriptive statements or segments of the document.

Mandatory implementation of the program is September, 1985.

ALBERTA EDUCATION PUBLICATIONS

The following service publications and prescriptive documents are available from Alberta Education to administrators and business education teachers.

From Curriculum Branch, Program Development Division

1. Program of Studies
2. Junior-Senior High School Handbook
3. Accounting 10-20-30 Curriculum Guide
4. Basic Business 20-30 Curriculum Guide
5. Computer Processing 10-20-30 Curriculum Guide
6. Law 20-30 Curriculum Guide
7. Marketing 20-30 Curriculum Guide
8. Office Procedures 20-30 Curriculum Guide
9. Shorthand 20-30 Curriculum Guide
10. Typewriting 10-20-30 Curriculum Guide
11. Optional (Business Education 10-20-30) Curriculum Guide
 - 11.1 Record Keeping 10
 - 11.2 Business Calculation 20
 - 11.3 Business Communication 20
 - 11.4 Dicta Typing 20
 - 11.5 Word Processing 30
12. Junior High School Typewriting Curriculum Guide, 1973
13. Accounting 10-20-30 Curriculum Implementation Manual for Teachers (published December, 1985)
14. Basic Business 20-30 Curriculum Implementation Manual for Teachers (published December, 1985)
15. Computer Processing 10-20-30 Curriculum Implementation Manual for Teachers (published December, 1985)
16. Law 20-30 Curriculum Implementation Manual for Teachers (published December, 1985)
17. Marketing 20-30 Curriculum Implementation Manual for Teachers (published December, 1985)
18. Office Procedures 20-30 Curriculum Implementation Manual for Teachers (published December, 1985)
19. Shorthand 20-30 Curriculum Implementation Manual for Teachers (published December, 1985)
20. Typewriting 10-20-30 Curriculum Implementation Manual for Teachers (published June, 1986)

From School Book Branch

1. School Book Branch Catalogue

For further information, contact Curriculum Branch (Program Development Division) or Edmonton or Calgary Regional Offices (Program Delivery Division).

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PROGRAM PHILOSOPHY

Business Education is an interdisciplinary study of the principles, procedures and technologies within the business environment and thus plays a significant role in meeting the Goals of Schooling and Goals of Education in Alberta Schools. Within this program a student has the opportunity to learn more about the role of a future participant within a productive society and to build a framework for a successful career. The knowledge, skills, attitudes and habits expected in business assist students, upon completion of high school, to respond to the opportunities and expectations of the world of work.

The development of the individual's potential in the areas of psychomotor, affective and cognitive domains is central to learning and instruction. Individuals discover themselves and realize their potential by interacting with ideas, technology and people. The world of business is an appropriate focus for this interaction.

Presented from the dual viewpoint of the individual as a consumer within the marketplace and a participant within the production cycle, the content within the Business Education Program provides for development of:

1. Skills and knowledge all citizens need to successfully participate in the business world,
2. Skills for immediate job entry, and
3. Skills and knowledge supportive of a business-related, post-secondary program.

The continuum of experiences within the business education program starts with exploratory activities in junior high school and expands in scope and depth at the high school level. The program can meet the three general objectives while providing viable alternatives and challenge for students of all levels of ability and interests. The relevance of the program is further enhanced through the integration of technology and related practices throughout the program, helping prepare the student for the information age.

LEARNING PRINCIPLES

Business Education courses incorporate the following learning principles:

1. Student learning should move from the level of prior knowledge through the course objectives at a rate governed by the students' aptitude and attitude. Learning will be maximized in environments where student initiative is encouraged and the learning environment is non-threatening and considered relevant to the learner.
2. Since students learn in different ways, a variety of methodologies and presentations should be used to meet the various learning styles of the individual. Presenting content in a variety of contexts reinforces the students's ability to apply the concept in a variety of circumstances and in an appropriate manner.
3. Personal learning goals should reflect the broader objectives of the program. Establishing a learning environment wherein self-analysis and personal evaluation are promoted encourages confidence, decision making, self-motivation, and critical thinking skills.
4. Skills development is promoted through appropriately structured learning experiences which may or may not include necessary repetition and the application of tasks that are relevant to future experiences. Development of skills is only part of the learning process. Students must understand when and how to apply these skills.
5. Establishing opportunities for success and building on the positive influence of rewards develops self confidence and motivation.

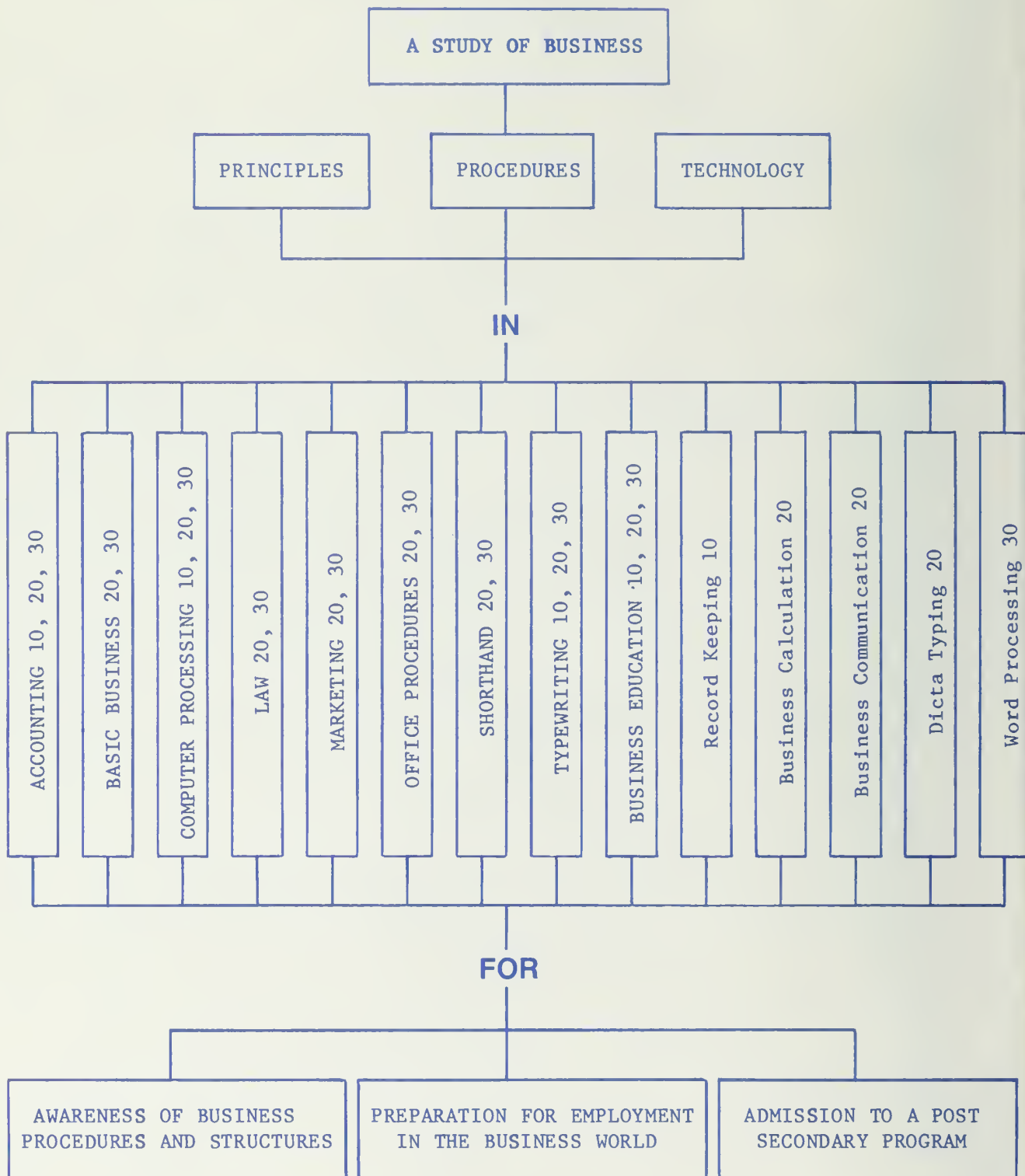
PROGRAM OBJECTIVES

Senior High School

The business education curriculum provides education ABOUT business for ALL students in order that they become informed citizens, and education FOR business for SOME students in order that they become effective workers. More specifically, the purpose of the program is:

1. To provide a meaningful study of the business environment including the ideas, people, and technology of business.
2. To provide for the development and acquisition of business knowledge and skills which will be most useful and durable in a rapidly changing society.
3. To provide an opportunity for students to elect and pursue individual interests and specialization in the study of the business environment.
4. To develop acceptable communication and interpersonal skills.
5. To develop the thinking strategies and problem-solving abilities of students.
6. To provide an opportunity for students to relate and apply learnings in business education to other areas of study.
7. To expose students to the business environment for the purpose of acquiring information, gaining experience, and testing ideas and hypotheses.
8. To provide for a general understanding of business and the development of skills for personal use.
9. To provide background skills and knowledge for specialization in business and/or admission to post-secondary programs.
10. To prepare for job entry upon completion of high school and for future advancement in business.

SCHEMATIC OVERVIEW OF PROGRAM



COURSE SEQUENCES

Courses listed on the same line and to the left indicate a prerequisite. The maximum credits available to a student for use on a high school diploma is shown in the left column. Whether the course may be offered for 3 and/or 5 credits is shown in brackets following the course name. Some courses have additional prerequisites. These are indicated with solid lines.¹

imum
redits

3	1501 Accounting 10 (3)(5)	2501 Accounting 20 (3)(5)	3500 Accounting 30 (5)
5	1527 Computer Processing 10 (3)(5)	2527 Computer Processing 20 ² (3)(5)	3527 Computer Processing 30 (3)(5)
0		2541 Basic Business 20 (3)(5)	3541 Basic Business 30 (3)(5)
0	1542 Business Education 10 (3)(5)(10)	2542 Business Education 20 (3)(5)(10)	3542 Business Education 30 (3)(5)(10)
3	1550 Record Keeping 10 (3)		
3		2566 Dicta Typing 20 (3)	
5	*1565 Typewriting 10 (3)(5)	2565 Typewriting 20 (3)(5)	3565 Typewriting 30 (5)
3			3567 Word Processing 30 (3)
0		2555 Shorthand 20 (3)(5)	3555 Shorthand 30 (3)(5)
0		2545 Office Procedures 20 (3)(5)	3545 Office Procedures 30 (3)(5)
3		2543 Business Communication 20 (3)	
3		2544 Business Calculation 20 (3)	
0		2430 Law 20 (3)(5)	3430 Law 30 (3)(5)
0		2540 Marketing 20 (3)(5)	3540 Marketing 30 (3)(5)

¹ Please refer to the BUSINESS EDUCATION MANUAL FOR ADMINISTRATORS, COUNSELLORS, AND TEACHERS for criteria for module selection.

* Typewriting 10 is required for Dicta Typing 20; Typewriting 20 is required for Word Processing 30, Shorthand 30, and Office Procedures 30.

² Computer Literacy 10 may be used as an alternate prerequisite to Computer Processing 20.

³ A student can take Computer Literacy 10 or Computer Processing 10, followed by Computer Processing 20 and then Computer Processing 30. However, the maximum number of credits available to a student in Computer Literacy and Computer Processing is fifteen (15).

GUIDELINES FOR STRUCTURING BUSINESS EDUCATION COURSES

GENERAL GUIDELINES

The structure of the business education program allows schools to design courses to meet the specific needs of the students in that school. The content has been organized into sequenced and unsequenced modules organized under the following eight main subject areas or strands.

- | | |
|---------------------------------------|--------------------------------|
| 1. Accounting 10, 20, and 30 | 5. Marketing 20 and 30 |
| 2. Basic Business 20 and 30 | 6. Office Procedures 20 and 30 |
| 3. Computer Processing 10, 20, and 30 | 7. Typewriting 10, 20, and 30 |
| 4. Law 20 and 30 | 8. Shorthand 20 and 30 |

Subject to the constraints outlined in the curriculum guides, modules are to be formatted into 3- or 5-credit courses within each strand. Schools or school jurisdictions should designate 3 modules for a 3-credit course and 5 modules for a 5-credit course. The optional strand modules may be used to enhance the subject area strands or, alternatively, combined to form 3-credit courses.

The program to be offered should be established through consultation of teaching, guidance, and administrative personnel. In order to promote consistency between grade levels and establish appropriate standards for student evaluation, jurisdictions may wish to monitor the selection of modules. Care should be taken to ensure that students' programs do not repeat modules.

Course sequences are outlined in the yearly-published Junior-Senior High School Handbook. These course sequences are also listed on page 8. For further information regarding module sequences and equipment requirements, refer to the specific modules within the curriculum guides and/or the Business Education Manual for Administrators, Counsellors, and Teachers.

BUSINESS EDUCATION 10, 20, AND 30

In addition to or as an alternative to the courses designated under the subject strands, (i.e., Typewriting 20, Law 30, etc.) 3, 5, or 10 credits may be offered in each of Business Education 10, 20, and 30 to a maximum of 30 credits. Business Education 10, 20, or 30 courses are created by selecting a number of modules from the eight main subject strands as well as from the Optional strand. Elective modules within the subject strands may only be selected if students have taken the core modules identified in the strands. Business Education 10, 20, and 30 courses are sequential.

MINI COURSES

As an alternative to using the modules in the Optional strand to enhance subject area courses, modules from the Optional strand may be grouped together to form 3-credit courses as follows:

Record Keeping 10	-	(1) Record Keeping 1 (2) Record Keeping 2 (3) Record Keeping 3
Business Calculation 20	-	(4) Business Calculation 1 (5) Business Calculation 2 (6) Business Calculation 3
Business Communication 20	-	(7) Business Communication - Development (8) Business Communication - Practice (9) Business Communication - Integration
Dicta Typing 20	-	(12) Dicta Typing 1 (13) Dicta Typing 2 (16) Business Simulation
Word Processing 30	-	(14) Word Processing 1 (15) Word Processing 2 (16) Business Simulation

ENHANCEMENT: Use of Optional Modules

A subject strand course may be enhanced by including a module or modules from the Optional strand that supports the objective for a particular course. Inclusion of modules from subject strands other than Optional is not permissible. Not more than one Optional module may be included at each grade level in a 3-credit course, and not more than two optional modules may be included at each grade level in a 5-credit course. The Business Research and Business Simulation modules may, however, be used once in each subject strand provided that the topic is not duplicated. The Optional strand modules are:

1. Record Keeping 1
2. Record Keeping 2
3. Record Keeping 3
4. Business Calculation 1
5. Business Calculation 2
6. Business Calculation 3
7. Business Communication - Development
8. Business Communication - Practice
9. Business Communication - Integration
10. Business Research Project
11. Goal Setting and Career Development
12. Dicta Typing 1
13. Dicta Typing 2
14. Word Processing 1
15. Word Processing 2
16. Business Simulation

MATRIX

SUBJECT STRANDS

(13)* ACCOUNTING			(10)* BASIC BUSINESS		(15)* COMPUTER PROCESSING			(10)* LAW					
C	1	Basic Accounting Concepts	BB 20	C	1	Canadian Business	C	1	Computer Information Systems	LW 20	C	1	Nature of Law and the Civil Law System
C	2	Journalizing and Posting		C	2	Consumer Credit	E	2	Overview of Software		C	2	Contract Law
C	3	Completing the Accounting Cycle		C	3	Insurance	E	3	Applications: Data Entry		C	3	Family Law
C	4	Merchandise Accounting					E	4	Applications: Word Processing				
C	5	End-of-Year Adjustments & 8-Column Worksheets	BB 30	C	4	Economic Concepts	E	5	Applications: Computer Simulations	LW 30	C	4	Basic Rights and Responsibilities
E	6	Optional Accounting Tasks		C	5	Small Business Management I	E	6	Applications: Data Base		C	5	Labour Law
E	7	Voucher System and End-of-Year Adjustments		C	6	Management Techniques	E	7	Applications: Electronic Spread Sheet		C	6	Property Law
E	8	Departmentalized Tasks					E	8	Overview of Introductory Programming Language				
E	9	Partnership and Corporation Accounting	ELECTIVE	E	7	Personal Financial Planning	E	9	Fundamentals of Input/Output	ELECTIVE	E	7	Criminal Justice System
E	10	Cost Accounting		E	8	Small Business Management II (Simulation)	E	10	Introduction to Advanced Computer Programming Techniques		E	8	Consumer Law
E	11	Financial Analysis					E	11	Advanced Computer Programming Techniques		E	9	Tort Law
E	12	Accounting Simulation I					E	12	Extended Programming Project		E	10	Controversial Issues
E	13	Accounting Simulation II: Computerized Accounting					E	13	Introduction to Second Programming Language				
							E	14	Applications in Second Programming Language				
							E	15	Extended Project in Second Programming Language				
							E	16	Graphics				
							E	17	Systems Analysis and Program Development				
							E	18	Machine/Assembly Language				

(10)* MARKETING		(10)* OFFICE PROCEDURES	(10)* SHORTHAND	(15)* TYPEWRITING
MK 20	C 1. World of Marketing	C 1. Structure of the Business Office	C 1. Shorthand Theory 1	C 1. Keyboarding
	C 2. Advertising and Sales Promotion	E 2. Personnel in the Business Office	C 2. Shorthand Theory 2	C 2. Keyboarding, Centering and Tabulation
	C 3. Distribution of Goods and Services	E 3. Business Communication	C 3. Shorthand Theory 3	C 3. Letters and Essays
MK 30		E 4. Records Management	E 4. Shorthand Theory, Dictation & Transcription 1	C 4. Reports
	C 4. Marketing Research	E 5. Information Processing	E 5. Shorthand Theory, Dictation & Transcription 2	C 5. Letters & Tables
	C 5. Pricing and Financial Activities	E 6. Clerical Routines	E 6. Speed & Transcription Skill Building 1	C 6. Manuscripts
	C 6. Selling	E 7. Secretarial Routines	E 7. Speed & Transcription Skill Building 2	C 7. Tables, Business Forms & Financial Reports
		E 8. Office Specialties I	E 8. Speed & Transcription Skill Building 3	C 8. Business Correspondence
ELECTIVE	E 7. Display	E 9. Office Specialties II	E 9. Speed & Transcription Skill Building 4	E 9. Specialized Prod. Application
	E 8. Purchasing & Controlling Merchandise	E 10. Office Simulation	E 10. Speed & Transcription Skill Building 5	E 10. Production Projects & Review
				E 11. Professional Applications I
				E 12. Professional Applications II
				E 13. Simulation I
				E 14. Simulation II

OPTIONAL

OPTIONAL

Subject to restrictions noted in the curriculum guides, these optional modules may be used to enhance the subject strand courses

- 1 Record Keeping 1
- 2 Record Keeping 2
- 3 Record Keeping 3
- 4 Business Calculation 1
- 5 Business Calculation 2
- 6 Business Calculation 3
- 7 Business Communication — Development
- 8 Business Communication — Practice
- 9 Business Communication — Integration
- 10 Business Research Project
- 11 Goal Setting and Career Development
- 12 Dicta Typing 1
- 13 Dicta Typing 2
- 14 Word Processing 1
- 15 Word Processing 2
- 16 Business Simulation

MINI COURSES

(3)* RECORD KEEPING 10	(3)* BUSINESS CALCULATION 20	(3)* BUSINESS COMMUNICATION 20
C 1 Record Keeping 1 C 2 Record Keeping 2 C 3 Record Keeping 3	C 1 Business Calculation 1 C 2 Business Calculation 2 C 3 Business Calculation 3	C 1 Business Communication — Development C 2 Business Communication — Practice C 3 Business Communication — Integration
(3)* DICTA TYPING 20	(3)* WORD PROCESSING 30	
C 1 Dicta Typing 1 C 2 Dicta Typing 2 C 3 Business Simulation	C 1 Word Processing 1 C 2 Word Processing 2 C 3 Business Simulation	

BUSINESS EDUCATION 10-20-30

(30) BUSINESS EDUCATION 10-20-30
Modules from any of the 8 subject strands, and/or the Optional strand may be combined to form three, five or ten credit courses at the 10, 20 or 30 level. The courses are sequential. Elective modules may only be included in a program when core modules have been completed. Care should be taken to ensure that student programs do not duplicate modules.

*Refers to maximum credits available.
Note: Core modules are prerequisite to elective modules.
Code: C — Core
E — Elective

OFFICE PROCEDURES 20-30

Introduction

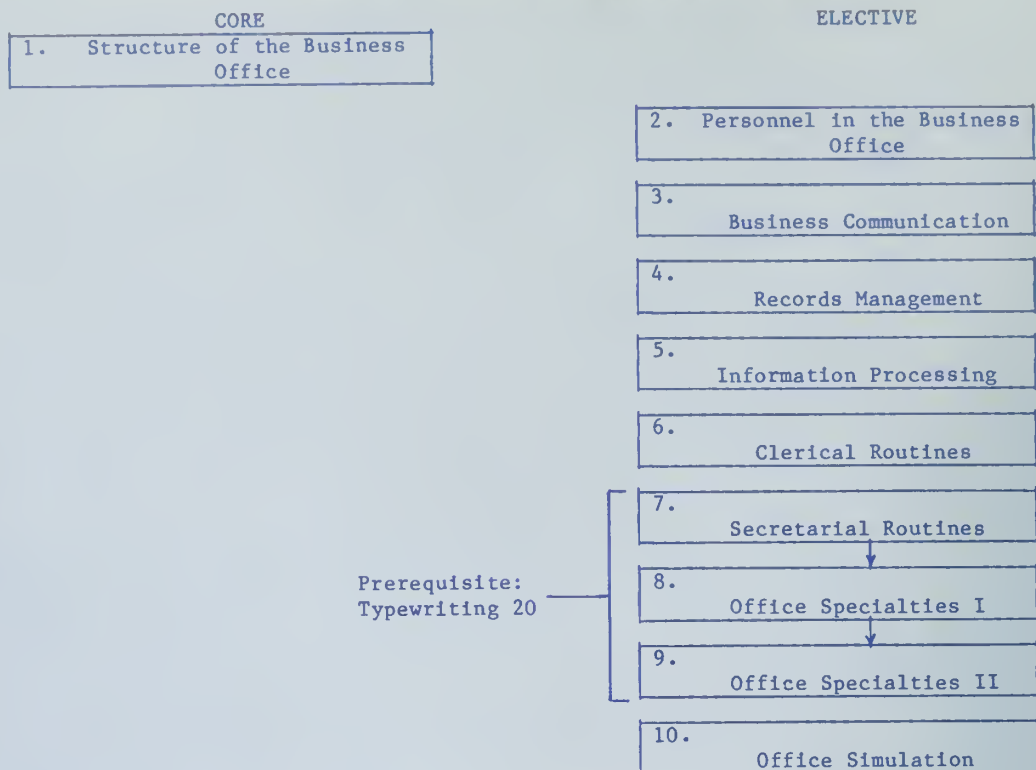
Office Procedures provides students with the opportunity to study the structure, procedures, and technology common to modern Canadian business offices. A major focus of the course is the integration of skills, procedures, and attitudes within an environment that simulates a modern office. Office Procedures 20-30 program encourages the development of vocational-level competencies suitable for students interested in clerical or secretarial occupations.

Objectives

The student will:

1. Examine the organization, functions, and procedures common to a business office.
2. Examine the various career paths, benefits, and responsibilities of the personnel within the business office.
3. Become familiar with the various methods of communication utilized in a modern business office.
4. Apply the current procedures for the storage, retention, reproduction, and retrieval of recorded information.
5. Examine the routines related to the processing of words and data through the study of procedures, equipment, and personnel.
6. Demonstrate the clerical routines that support the efficient handling of goods and services in the modern office.
7. Demonstrate efficient secretarial skills and procedures that support the activities of management.
8. Utilize the terminology, documentation, and procedures prevalent in a selected secretarial specialization.
9. Integrate the basic skills, specialized knowledge, and human relations skills developed throughout the business program, within a simulated or in an actual business environment.

FLOWCHART OF MODULES



Notes On Course Implementation

The Office Procedures subject strand identifies 10 modules, 1 core and 9 elective. The core module is prerequisite to the elective modules. The elective modules are not sequential, although modules 7, 8, and 9 are recommended for 30-level courses.

Modules 1-5 are particularly suitable for a program designed for students interested in general (clerical) office occupations which do not emphasize secretarial routines. Module 10 could be included to support either clerical- or secretarial-oriented courses.

Modules 7, 8, and 9 require Typewriting 20 as a prerequisite and should be taught in a classroom equipped with electric/electronic typewriters or machines with text editing capability. Courses offered at the 30 level should expand basic skills and concepts and require students to demonstrate a skill level that reflects business standards.

Courses may be developed for Office Procedures 20 and 30 in modular groups of 3 or 5 to a maximum of 10 credits. Modules from the "Optional" column which are recommended for use within Office Procedures 20 and/or 30 are:

- | | | |
|------------|-----|--------------------------------------|
| Module No. | 8. | Business Communication - Practice |
| | 9. | Business Communication - Integration |
| | 11. | Goal Setting and Career Development |
| | 12. | Dicta Typing 1 |
| | 13. | Dicta Typing 2 |
| | 14. | Word Processing 1 |
| | 15. | Word Processing 2 |
| | 16. | Business Simulation |

Refer to individual modules for further information regarding equipment requirements or prerequisites.

Integration of Work

It is recommended that the work study component of work experience be integrated into the office procedure program. Also, the work experience program could be planned in conjunction with Office Procedures 30.

MODULE 1: THE STRUCTURE OF THE BUSINESS OFFICE

Status: Core

Purpose: To provide the student with an awareness of how the office functions in a business organization and of the related procedures common to a business office.

Notes: Teachers may wish to spend additional time on some of the basic office functions if Modules 4 and/or 5 are not included in the office procedures program.

TOPIC	LEARNING TASKS	TEACHING NOTES
Organization and Management	<p>The student will:</p> <p>describe the types of business organizations</p> <p>discuss the role of management</p> <p>examine and interpret organizational charts</p>	<p>single proprietorship, franchise partnership, corporation (public/private), cooperative</p> <p>controlling, planning, organizing, managing people</p>
Office Functions (Overview)	<p>explain the role of the office in a business enterprise</p> <p>discuss the coordination and relationship between the office worker and the functions and services within the organizational structure</p> <ul style="list-style-type: none"> - managerial/administrative/supervisory - personnel - public relations - research and development - communications (internal and external) - information processing - records management <p>outline skills needed by personnel involved in one or more of these functions</p> <p>discuss the purpose of office manuals</p> <p>discuss mechanisms within offices that deal with problem-solving and conflict resolution</p> <p>examine the complexity of office organization and functions as related to the number of personnel, size of operation, and degree of specialization</p>	<p>reference to organization's procedures, policies, personnel</p> <p>formal informal</p>
Organization of Work	<p>describe how layout of equipment and furniture facilitates the function of the office</p>	<p>Visit several offices to prepare the layout of the facilities, furniture, and equipment; show the normal flow of work.</p>

TOPIC	LEARNING TASKS	TEACHING NOTES
Organization of Work (cont'd)	<p>demonstrate effective use of work space and efficient flow of work</p> <p>discuss the concept of productivity</p> <p>outline strategies for improving work</p> <p>identify reference materials that would assist in task completion</p>	<p>prioritization, sequencing, material controls, reminders</p> <p>thesaurus, dictionary, handbook, postal code</p>
Office Safety	<p>examine the factors that affect safety in the working environment</p> <p>demonstrate efficient and proper use of equipment and supplies</p>	<p>ergonomics</p>
Employees' Benefits and Protections	<p>identify the safeguards and restrictions provided by legislation and regulations</p> <p>discuss the impact that unions, associations, and informal groups have on office working conditions, benefits, and environment</p> <p>outline required and optional deductions from salary</p>	<ul style="list-style-type: none"> - Individual Rights Protection Act/ Charter of Rights and Freedoms - Unemployment Insurance Regulations - Workers' Compensation Regulations - Employment Standards Regulations - Occupational Health and Safety

MODULE 2: PERSONNEL IN THE BUSINESS OFFICE

Status: Elective
Prerequisite: Module 1

Purpose: To expand the student's awareness of the need for positive human relations and to build an awareness of various career paths within the business office.

TOPIC	LEARNING TASKS	TEACHING NOTES
Job Description	<p>The student will:</p> <p>examine staff recruitment, training, retraining, inservice, and professional development activities</p> <p>compare various job descriptions in terms of tasks performed, remuneration, and benefits received</p> <p>outline the flow of work for one (or more) office function</p>	<p>document preparation</p> <p>sales/purchases</p> <p>handling requests</p>
Human Relations	<p>describe positive interpersonal characteristics that affect teamwork, morale, and productivity</p> <p>develop skills in dealing with sensitive situations</p> <p>develop skill in giving and following written and verbal directions</p> <p>demonstrate efficient and effective personal communications skills</p> <p>identify strategies for giving and receiving criticism</p> <p>develop an awareness of the importance of effective personal grooming and wardrobe selection</p> <p>contrast the formality of conduct in various offices</p> <p>discuss the effects that absenteeism, job ineffectiveness, tardiness, and poor human relations have on a business enterprise</p>	<p>cooperative, dependable, positive, confident</p>

MODULE 3: BUSINESS COMMUNICATION

Status: Elective

Prerequisite: Module 1

Purpose: To provide the student with an opportunity to become familiar with the various methods of communication utilized in a business office.

Recommendation: As keyboarding skills could be effectively used in this module, a prerequisite of Typewriting 10 is suggested.

TOPIC	LEARNING TASKS	TEACHING NOTES
Non-Written Forms of Communication	<p>The student will:</p> <p>demonstrate effective oral communication</p> <p>discuss the significance of body language</p> <p>demonstrate effective listening skills</p>	
Meeting the Public	<p>demonstrate appropriate ways to deal with callers</p> <p>practise making proper introductions</p> <p>discuss common courtesies used in business</p> <p>demonstrate appropriate procedures for scheduling, recording, and confirming appointments</p>	<p>receive</p> <p>screen</p> <p>announce</p>
Telecommunication Services	<p>discuss the various methods of communication available to business</p> <p>practise the use of telephone courtesy</p> <p>explain the routine to be followed for various telephone situations</p> <p>identify various communication equipment</p>	<p>telephone, electronic mail, satellite, teletype, video telephones, teleconferencing</p> <p>time zones, WATS line long distance, and local incoming and outgoing calls</p> <p>telephones, switchboards</p>
Written Forms of Communication	<p>compose written communications with emphasis on correct grammatical structure and clarity of expression</p> <p>prepare mailable letters, envelopes, and business forms</p> <p>prepare situational correspondence</p>	<p>letters, memos, reports, forms</p> <p>inquiry, invitation, appointment, sympathy</p>

TOPIC	LEARNING TASKS	TEACHING NOTES
Reproduction of Written Information	<p>identify reprographic processes</p> <p>discuss the function of the computer in the printing process</p> <p>demonstrate skill in layout for camera-ready copy</p> <p>discuss the relative advantages and disadvantages of various reprographic processes</p>	<p>electronic, infrared, phototypeset, electrostatic</p>
Processing Written Communication and Materials	<p>outline the procedures for processing incoming mail</p> <p>outline the procedures for preparing outgoing mail</p> <p>contrast mailing procedures used in small and large offices</p>	<p>sorting, opening, checking, dating, routing, distributing, recording</p> <p>individual items volume materials</p>
Transmission of Written Communications	<p>outline the characteristics of the various classes of mail</p> <p>compare the services and costs of the classes of mail</p> <p>describe the special-requirement services available from the post office</p> <p>describe and assess other means of delivery</p> <p>discuss the impact of electronic technology and communicating terminals on transmission of written communication</p> <p>contrast the advantages and disadvantages of using mail or telecommunication services</p>	<p>registered, special delivery, money order, telepost</p> <p>courier, express, freight</p>
Business Meetings	<p>demonstrate ability to arrange business meetings for various types of business enterprises</p> <p>discuss the purpose and importance of formal and informal meetings to business communication</p> <p>develop skills to promote efficient use of time, facilities, and personnel during business meetings</p>	<p>notice of meeting set an agenda book location</p> <p>rules of order</p>

MODULE 4: RECORDS MANAGEMENT

Status: Elective
Prerequisite: Module 1

Purpose: To enable the student to understand and apply current procedures for the storage, retention, reproduction, and retrieval of records information.

TOPIC	LEARNING TASKS	TEACHING NOTES
Basics for Records Management	<p>The student will:</p> <ul style="list-style-type: none"> identify scope of records management explain why records are kept identify components of a records management program discuss records management career opportunities 	<p>data, information, knowledge, record, and records management</p>
Files Management	<ul style="list-style-type: none"> explain file systems list types of media for records storage describe what a record can be use rules of basic filing compare the basic systems for classifying records identify basic file supplies and their use identify basic records storage equipment and describe its use 	<p>classification system, classifying codes, file, file folder, file system, filing</p> <p>alphabetic, chronologic and numeric filing</p> <p>folders, labels, guides and tabs</p> <p>drawer file cabinets, lateral file cabinets and shelf units</p>
Filing Procedures	<ul style="list-style-type: none"> prepare records for filing apply basic filing (indexing) rules and filing guidelines describe basic file system control and maintenance 	<p>cross referencing, filing, indexing/coding, inspection, release marks, sorting</p> <p>charge-out or control system, charging out, following up</p>

TOPIC	LEARNING TASKS	TEACHING NOTES
Records Retention Schedule	<p>outline the concept of records retention scheduling</p> <p>explain different types of records</p>	<p>administrative and operational, archival, and vital</p>
Records Centre Facilities	<p>compare centralized and decentralized filing</p> <p>explain the purpose of an active records centre or central file area</p> <p>explain the purpose of an inactive records centre</p> <p>list alternative locations for an inactive records centre</p>	<p>There can be a combination of centralized and decentralized filing within an organization.</p> <p>active records centre or central file area, active records</p> <p>inactive records centre, inactive records, semi-active records</p>
Other Media	<p>differentiate between types of records storage media:</p> <ul style="list-style-type: none"> - micrographics (disk) - microforms - audio/visuals - electronic <p>identify advantages of using microforms</p>	<p>Guidelines for filing records stored on paper can be applied to records stored on other media.</p> <p>aperture card, computer-output microfilm, electronic filing, magnetic media, microfiche, microfilm jacket, microforms, microimage, microrecords, reader, printer, roll microfilm</p> <p>Record (definition) - a record exists whenever data is organized.</p> <p>Data need not be put on paper to become a record.</p> <ul style="list-style-type: none"> - reduce space - reduce record loss or theft - reduce file retrieval time - reduce amount of paper stored and in use - reduce postage costs
File Project	<p>prepare a file system that meets the records management needs of an an office</p>	<ul style="list-style-type: none"> - select a classification system - organize a file system - prepare a file index

MODULE 5: INFORMATION PROCESSING

Status: Elective

Prerequisite: Module 1

Objective: To enable the student to understand the routines related to information processing through the study of procedures, equipment, and people.

Requirement: It is recommended that students have access to dictation equipment and data and/or word processing equipment.

Notes: The emphasis of this module is on developing an awareness of the CONCEPTS related to word and data processing. Word Processing I and II from the Optional strand should be used to develop operator skill on word processing equipment. Dicta Typing I and II from the Optional strand should be used to develop operator skill on dictation equipment.

Recommendation: As keyboarding skills could be effectively used in this module, a prerequisite of Typewriting 10 is suggested.

TOPIC	LEARNING TASKS	TEACHING NOTES
Electronic information processing	<p>The student will:</p> <p>recognize the factors that have resulted in the use of electronic processing of information</p> <p>contrast manual/mechanical with electronic information processing</p> <p>outline the basic information processing steps and identify devices used for each step</p> <p>outline in sequential form the process from document initiation to distribution</p> <p>apply terms specific to the procedures and technology of information processing</p>	<p>technological advances</p> <p>increased labour cost</p> <p>input, output, storage, process, distribution</p> <p>flowchart</p>
Organizational concepts	<p>identify the types of information handled by information processing systems</p> <p>discuss skills needed for efficient information processing</p> <p>identify career paths in data and word processing fields</p> <p>identify methods used to monitor the accuracy and efficiency of data and word processing operators</p> <p>discuss the capabilities and capacity of information processing equipment used in various organizations</p> <p>discuss considerations related to information processing equipment in the office</p>	<p>organize information</p> <p>enter information</p> <p>use information</p> <p>staffing</p> <p>ergonomics</p> <p>health concerns</p> <p>environmental controls</p>

TOPIC	LEARNING TASKS	TEACHING NOTES
Input	identify methods by which information is originated	handwritten portable dictation units desktop dictation units central dictation systems telephone tie-ins person-to-person
	demonstrate the proper procedures for recording and transcribing information on dictation/transcription equipment	dictate material and instructions to another person and/or on a machine
Storage	discuss the various media for storing records	paper tape, microfilm, microfiche disk
	outline procedures to control work flow and ensure efficient retrieval and maintenance of information	logging, mark code, log sheet
Output	compare the various types of equipment available to reproduce information	printers photocopiers
	identify alternate methods of duplication suitable to a variety of circumstances	
	demonstrate awareness of the variety of internal and external distribution channels	hard copy (letters, memos) soft copy (electronic messaging) voice (meetings, telephone)

MODULE 6: CLERICAL ROUTINES

Status: Elective
Prerequisite: Module 1

Purpose: To provide students with the opportunity to understand and develop skill in the clerical routines that support the handling of goods and services.

Recommendation: Access to electronic printing calculators.

TOPIC	LEARNING TASKS	TEACHING NOTES
Business Systems	<p>The student will:</p> <p>discuss the interdependence among functions within an organization</p> <p>discuss the importance of routines and systems to the success of the organization</p>	<p>filing, reprographics, word processing, data processing, mailing, shipping, manufacturing, customer service, and accounting systems</p>
Purchasing Routines	<p>identify procedures for purchasing goods within large and small offices</p> <p>compute purchase discounts/interest</p> <p>prepare, analyze, and verify purchase forms</p>	<p>identifying supplies form handling purchase requisitions purchase orders</p>
Receiving Routines	<p>discuss the procedures for receiving goods</p> <p>discuss the importance of control procedures</p> <p>prepare, analyze, and verify stockroom control forms</p>	<p>form handling, bill of lading, purchase order, invoice, packing slip stockroom records</p> <p>stock requisitions, computer control, inventory records (manual/electronic)</p>
Sales Routines	<p>discuss the importance to sales of effective receiving, shipping, and billing procedures</p> <p>compute selling price</p> <p>prepare, analyze, and verify sales forms</p>	<p>prepare flowcharts</p> <p>taxes, mark-up/down discounts, margin</p> <p>sales orders invoices cash sales credit memorandum</p>

TOPIC	LEARNING TASKS	TEACHING NOTES
Banking Routines	<p>discuss the features of a current bank account</p> <p>outline the procedures for making deposits</p> <p>reconcile bank accounts with bank statements</p>	<p>cash</p> <p>credit card, debit cards</p> <p>cheques</p> <p>commercial drafts</p>
Shipping Routines	<p>discuss alternative transportation methods</p> <p>discuss terminology involved in shipping routines</p> <p>discuss the importance of insuring goods</p>	<p>land, air, sea</p> <p>charge, prepaid, COD, FOB, CIF</p>

MODULE 7: SECRETARIAL ROUTINES

Status: Elective
Prerequisite: Module 1 and Typewriting 20

Purpose: To provide students with an opportunity to understand and to develop skill in the secretarial routines that support management activity.

Notes: It is recommended that students have access to text-editing equipment.

TOPIC	LEARNING TASKS	TEACHING NOTES
Input/Output of Information	<p>The student will:</p> <p>demonstrate efficient information processing skills</p> <p>demonstrate effective listening skills to facilitate proper response to instructions</p> <p>produce mailable copy under a variety of conditions and from various types of input</p> <p>prepare from unarranged data a variety of business reports utilizing displays, headings, enumerations, tabulations, graphs, charts, and financial statements</p> <p>develop skill in efficient performance of tasks from simple and complex instructions</p> <p>develop proper and efficient editing and proofreading skill</p>	<p>straight copy material</p> <p>unedited material</p> <p>edited material</p> <p>dictated information (person-to-person or taped)</p> <p>verbal</p> <p>written</p> <p>use references:</p> <p>word usage</p> <p>dictionary</p> <p>thesaurus</p> <p>style</p>
Productivity	<p>discuss how productivity affects an operator's salary and opportunities for advancement</p> <p>list circumstances that can affect the length of time needed to complete tasks</p> <p>discuss the variety of ways productivity can be measured</p> <p>identify personal levels of productivity in completing a variety of tasks</p>	<p>turnaround time</p>

TOPIC	LEARNING TASKS	TEACHING NOTES
<p>Executive Secretary/ Administrative Assistant Functions</p> <p>a. Meetings</p> <p>b. Financial Management</p> <p>d. Travel</p> <p>c. Reference</p>	<p>prepare accurate minutes of meetings, seminars, or workshops</p> <p>make arrangements associated with meetings</p> <p>establish and maintain a petty cash fund</p> <p>discuss procedure for completing expenses claims</p> <p>make arrangements for a business trip</p> <p>discuss the conduct, standards and expectations of a secretary/administrative assistant</p> <p>identify the secretarial and administrative duties which may be required during absence of executive</p> <p>demonstrate skill in drafting notes and researching a topic by using various business references</p> <p>examine and use efficiently various business references</p>	<p>booking facilities, making reservations, obtaining needed supplies, follow-up</p> <p>reservation (hotel/car) itinerary travel documents</p> <p>place, person, product, service</p> <p>almanac, business directory</p>

MODULE 8: OFFICE SPECIALTIES I

Status: Elective

Prerequisite: Module 1 and Typewriting 20

Use: To provide the student with an opportunity to integrate the skills, tasks, and attitudes consistent with the terminology, documentation, and procedures prevalent in selected secretarial specializations.

Recommendation: That students have access to text-editing equipment.

It is recommended that students have access to teacher-prepared or publisher-produced materials that simulate office tasks. The concepts of mailability and economy of time with respect to labour, equipment and supplies should be integrated.

TOPIC	LEARNING TASKS	TEACHING NOTES
Terminology	The student will: select and become familiar with terminology unique to a specialty	
Resources	select and use suitable resources	texts, reference books, tapes
Skill Development	prepare mailable documents relative to the specialty in an efficient and competent manner	
Time Management	demonstrate the ability to establish suitable priorities, to manage resources, and to meet deadlines discuss sequence of duties relative to the particular specialty evaluate the factors that influenced the quality and quantity of output and assess how the activity could have been improved discuss personal interest in further study in the specialty	
Evaluation	assess the process and the product	

MODULE 9: OFFICE SPECIALTIES II

Status: Elective
Prerequisite: Module 7 and Typewriting 20

Purpose: To provide an opportunity for the student to pursue further study in an area of secretarial specialization within an office-like environment.

Recommendation: That students have access to text-editing equipment.

Notes: Access to a model office is recommended. Students should interact with others in collegial and authoritative relationships, accept responsibility, and manage time, equipment, and supplies efficiently.

TOPIC	LEARNING TASKS	TEACHING NOTES
Decision Making and Setting Objectives	<p>The student will:</p> <p>outline learning objectives and personal goals</p> <p>develop standards of output</p>	
Planning and Setting Priorities	<p>formulate a plan of action that includes a time-line</p> <p>outline basic tasks or activities to be accomplished</p> <p>identify skills needed to accomplish tasks</p>	
Integrating Skills	<p>apply previously acquired skills when performing tasks</p> <p>demonstrate a high degree of resourcefulness, self-motivation, and initiative</p>	
Evaluating the Outcome	<p>develop criteria by which to judge the effectiveness of an activity</p> <p>devise a method of evaluating the achievement of goals</p> <p>outline the positive and negative aspects of an activity</p>	<p>self-evaluation</p> <p>peer evaluation</p> <p>formal evaluation</p>
Developing Plans for Improvement	<p>analyze any problems that arise and prepare plans or procedures to resolve the problem</p>	

MODULE 10: OFFICE SIMULATION

Status: Elective
Prerequisite: Module 1

Purpose: To provide students with job preparation activities in a simulated or real environment.

Notes: Consideration should be given to integrating work-study within this module.

TOPIC	LEARNING TASKS	TEACHING NOTES
Defining Responsibilities	<p>The student will:</p> <p>recognize the difference between responsibilities designated and responsibilities accepted</p> <p>examine various job descriptions</p>	
Future Career Paths	<p>prepare a job description for a position that would be of personal interest</p> <p>outline the skills and knowledge required to qualify for the position</p>	
Lines of Authority	<p>relate the defined responsibilities to the organizational structure</p> <p>identify the scope of decision-making within the position</p>	
Tasks and Procedures	<p>outline tasks to be performed</p> <p>define priorities</p> <p>maintain a log of activities performed</p> <p>develop a procedures manual that outlines efficient, accepted procedures for meeting identified responsibilities</p>	
Attitudes	<p>evaluate interpersonal skills, attitude, motivation, initiative, cooperation, and level of confidence</p>	

GUIDELINES FOR STUDENT EVALUATION

The business education program deals with cognitive, psychomotor, and affective learning activities.

Evaluating student achievement in these domains is a process which is based on the objectives outlined for each of the modules that have been included in the course. The teacher should determine the expectations for student achievement at the time the course is being planned. A basic guideline for determining student grades is to assign marks in proportion to the time spent on that topic and its relative importance.

If the objectives of a module are vocationally-based, the assessment should be criterion referenced; that is, how much progress has the student made toward the attainment of specific, terminal performance objectives which are generally viewed as desirable in the work place.

If the objectives of the modules are based on general interest, the assessment could be norm referenced; that is, how does the student's performance compare with that of similar groups of students in the province.

Each module includes the PURPOSE, the TOPICS and the LEARNING TASKS. PURPOSE defines the general objective for the module. TOPICS outline the concepts to be studied within the module. LEARNING TASKS reflect the depth and scope for each topic. This wording defines the expected level of understanding or skill the student should attain--MASTERY, APPLICATION, or AWARENESS.

EXPECTATIONS REGARDING CONTENT FOR STUDENT ACHIEVEMENT

MASTERY level is expected if cognitive understanding of topic/learning task is prerequisite to further success, or psychomotor activity should meet a specified standard; or

APPLICATIONS level is expected if cognitive understanding of topic/learning task should be demonstrated or psychomotor activity should meet a specified standard; or

AWARENESS level is expected if cognitive understanding of topic/learning task requires basic understanding (comprehension) or recall (knowledge).

Teachers may modify the level of expectations (MASTERY, APPLICATION, AWARENESS) in order to ensure that the degree of challenge is suitable for the students in the class.

NOTE: Further information regarding student evaluation (file., justness, fairness and appeal procedures) may be found in your district's Student Evaluation Policy or Business Education Manual for Administrators, Counsellors and Teachers. In addition, the Office Procedures 20-30 Curriculum Implementation Manual for Teachers will includes recommendations for the allocation of marks.

LEARNING RESOURCES

The BASIC learning resources are:

LUKE, C.M. and STIEGLER, C.B. Office Systems and Procedures. (Canadian Edition) Markham, Ontario: Houghton Mifflin Canada Ltd., 1984 (suitable for introductory level for either secretarial or clerical emphasis).

The RECOMMENDED learning resources are:

LUKE, C.M. and STIEGLER, C.B. Teacher's Manual - Office Systems and Procedures. (U.S. Version) Boston: Houghton Mifflin Ltd., 1982.

LUKE, C.M. and STIEGLER, C.B. Office Systems and Procedures - Student Activities. (U.S. Version) Boston: Houghton Mifflin Ltd., 1982.

ATTRIDGE, C.M. and CUNNINGHAM, J. Projects to Accompany Contemporary Office Procedures. Toronto: McGraw-Hill Ryerson Ltd., 1984.

SMITH, P. et al. Pitman Office Handbook. Toronto: Copp Clark Pitman Ltd., 1982.

SMITH, P. and HAY-ELLIS, P. Pitman Office Handbook Activity Guide. Toronto: Copp Clark Pitman Ltd., 1978 (drill and practice material for Pitman Office Handbook).

SMITH, M.A. and LAKER, E. Canadian Filing Practice. (Second Edition) Copp Clark Pitman Ltd., 1978.

Canadian Secretaries Handbook. (Second Edition)
Don Mills, Ontario: Collier MacMillan Canada, Inc., 1983.

Practice Sets:

ATKINSON, P.S. and CLEMENT, J.E. Medical Office Practice. (Third Edition) Palo Alto, CA.: Southwestern Publishing Company, 1984 (suitable for Modules 8, 9, and 10).¹

ATKINSON, P.S. and CLEMENT, J.E. Medical Office Practice - Instructor's Manual. (Third Edition) Palo Alto, CA.: Southwestern Publishing Company, 1984 (suitable for Modules 8, 9 and 10).²

ATKINSON, P.S. and DRAPER, A. Typewriting Office Practice - Top Music. (Second Edition) Toronto: Gage Publishing Ltd., 1982 (suitable for Modules 8, 9, and 10).¹

ATKINSON, P.S. Typewriting Office Practice - Top Music, Teacher's Manual. (Second Edition prepared by Andrina Draper.) Toronto: Gage Publishing Ltd., 1982 (suitable for Modules 8, 9, and 10).^{1,2}

MATTHEWS, A.L. et al. Palmetto Insurance Company - The Word Processing Correspondence Secretary: An Office Job Simulation. Palo Alto, CA.: Southwestern Publishing Company, 1981 (suitable for Modules 8, 9, and 10).^{1,2}

MATTHEWS, A.L. et al. Palmetto Insurance Company - The Word Processing Correspondence Secretary: An Office Job Simulation, Employer's Manual. Palo Alto, CA.: Southwestern Publishing Company, 1981 (suitable for Modules 8, 9, and 10).^{1,2}

MCINTOSH, H. et al. Westchester Square Inc. - The Secretary: An Office Job Simulation. (Second Edition) Palo Alto, CA.: Southwestern Publishing Company, 1983 (suitable for Modules 8, 9, and 10).¹

MCINTOSH, H. et al. Westchester Square Inc. - The Secretary: An Office Job Simulation, Employer's Manual. (Second Edition) Palo Alto, CA.: Southwestern Publishing Company, 1983 (suitable for Modules 8, 9, and 10).¹

REYNOLDS, C. Snow Country Typewriting Practice Set. (Canadian Edition, prepared by Andrina Draper.) Toronto: Gage Publishing Ltd., 1980 (suitable for Modules 8, 9, and 10).¹

REYNOLDS, C. Manual - Snow Country Typewriting Practice Set. (Canadian Edition, prepared by Andrina Draper.) Toronto: Gage Publishing Ltd., 1980 (suitable for Modules 8, 9, and 10).¹

Computer Applications Software:

BROWN, H.R. Touchtype. Spirit River, Alberta: Software Spirit, 1983 (suitable for all levels).

LOTUS, P. Applewriter IIe. Cupertino, CA.: Apple Computer Inc., 1983 (suitable for all levels).

_____. Format II Enhanced Version. New York, N.Y.: Kensington Microwave, 1982 (suitable for all levels).

_____. Screenwriter II. Coarsegold, CA.: Sierra On-Line Inc., 1983 (suitable for all levels).

¹ These packages are also approved for Typewriting.

² These packages are also approved for Word Processing.

CORRELATION OF COURSE CONTENT WITH LEARNING RESOURCES

Office Procedures Subject Strand

Course Content	Office Systems and Procedures (Luke/Stiegler)
Module 1: The Structure of the Business Office	
a) Organization and Management	-
b) Office Functions (overview)	Unit 1
c) Organization of Work	Unit 3
d) Office Safety	-
e) Employee's Benefits and Protections	Unit 1; Part 1
Module 2: Personnel in the Business Office	
a) Job Description	Unit 1
b) Human Relations	Unit 2
c) Ethics in the Business Office	Unit 1; Unit 17
d) Career Preparation Activities	Unit 17
Module 3: Business Communication	
a) Non-written Forms of Communication	Unit 2; Parts 1&3
b) Meeting the Public	Unit 4; Part 1
c) Telecommunications Services	Unit 5
d) Written Forms of Communication	Units 6, 7, 11
e) Reproduction of Written Information	Unit 10
f) Processing Written Communication and Materials	Unit 13
g) Transmission of Written Communications	Unit 13
h) Business Meetings	Unit 4; Part 3
Module 4: Records Management	
a) Basics for Records Management	Unit 8; Part 1
b) Files Management	Unit 8; Part 1
c) Filing Procedures	Unit 9
d) Records Retention Schedule	Unit 8; Part 1
e) Records Centre Facilities	Unit 8; Part 1
f) Other Media	-
g) File Project	-

Course Content	Office Systems and Procedures (Luke/Stiegler)
Module 5: Information Processing	
a) Electronic Information Processing b) Organizational Concepts c) Input d) Storage e) Output	Unit 12 Unit 12 Unit 12 Unit 12 Unit 12
Module 6: Clerical Routines	
a) Business Systems b) Purchasing Routines c) Receiving Routines d) Sales Routines e) Banking Routines f) Shipping Routines	- Unit 14 Unit 14 Unit 14 Unit 16; Parts 2,3 Unit 14
Module 7: Secretarial Routines	
a) Input/Output of Information b) Productivity c) Executive Secretary/Administrative Assistant Functions: i. Meetings ii. Financial Management iii. Reference iv. Travel	Units 2,6,7,11,16 Units 3, 17 (Unit 7; Part 3 (Unit 4; Part 3 Unit 16 - Unit 4; Part 3
Module 8: Office Specialties I	
a) Terminology b) Resources c) Skill Development d) Time Management e) Evaluation	Computronics: Office Simulation No. 1 & 2 - Worker Actions and Interactions: Case Study No. 1, 2

Course Content	Office Systems and Procedures (Luke/Stiegler)
<p>Module 9: Office Specialties II</p> <ul style="list-style-type: none"> a) Decision-Making and Setting Objectives b) Planning and Setting Priorities c) Integrating Skills d) Evaluating the Outcome e) Developing Plans for Improvement <p>Module 10: Office Simulation</p> <ul style="list-style-type: none"> a) Defining Responsibilities b) Future Career Paths c) Lines of Authority d) Tasks and Procedures e) Attitudes 	

Practice Sets (Modules 8, 9, and 10):

Medical Office Practice

Typewriting Office Practice - Top Music

Palmetto Insurance Company - The Word Processing Correspondence

Secretary: An Office Job Simulation

Snow Country Typewriting Practice Set

Westchester Square Inc. - The Secretary: An Office Job Simulation

Computer Applications Software:

Touchtype (suitable for all levels)

Applewriter IIe (suitable for all levels)

Format II (suitable for all levels)

Screenwriter II (suitable for all levels)

- Notes:
1. The basic resources cover the majority of the topics.
 2. The above correlations are suggested as guidelines to assist in teacher planning.

DATE DUE SLIP

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